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# Power to Purpose

A CASE STUDY ON CATALYZING CHANGE  
IN THE CFC THROUGH INNOVATION AND INSIGHT

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## The Challenge

For the past 58 years, the Combined Federal Campaign (CFC), the world's largest, workplace-based, charitable fundraising campaign, has orchestrated a complex global marketing and outreach effort. While the execution is complex, the goal is simple: engage the largest workforce in the challenges facing its local communities. Since 1962, the program has raised over \$8.3 billion in community support. Today, this venerable campaign has undergone a substantial transformation from its postwar tradition. Necessity drives change. As a younger generation of Millennial employees replaces the retiring Boomers in the Federal workforce, the CFC has struggled to retain its relevance. This generational transition, among other factors, has led to a persistent decline in fundraising outcomes since 2008's Great Recession. Declining results and the rise of data-driven marketing has propelled the decision for a "new" CFC.

### The Numbers

- *Addressable Audience:* over 10 million | 4.2 million workforce members | 2.6 federal and military retirees | 3.7 million government contractors
- *Campaign Fundraising:* \$8.3 billion over 57 years | World's Largest Workplace-based Charitable Fundraising Campaign
- *Campaign Volunteer "Army":* over 38,000 government volunteers
- *Non-profit Participants:* 8,000 charities | 75 global/national federations
- *Regional Zone Boards:* 36 | over 700 participating members

## Moving Toward a Solution

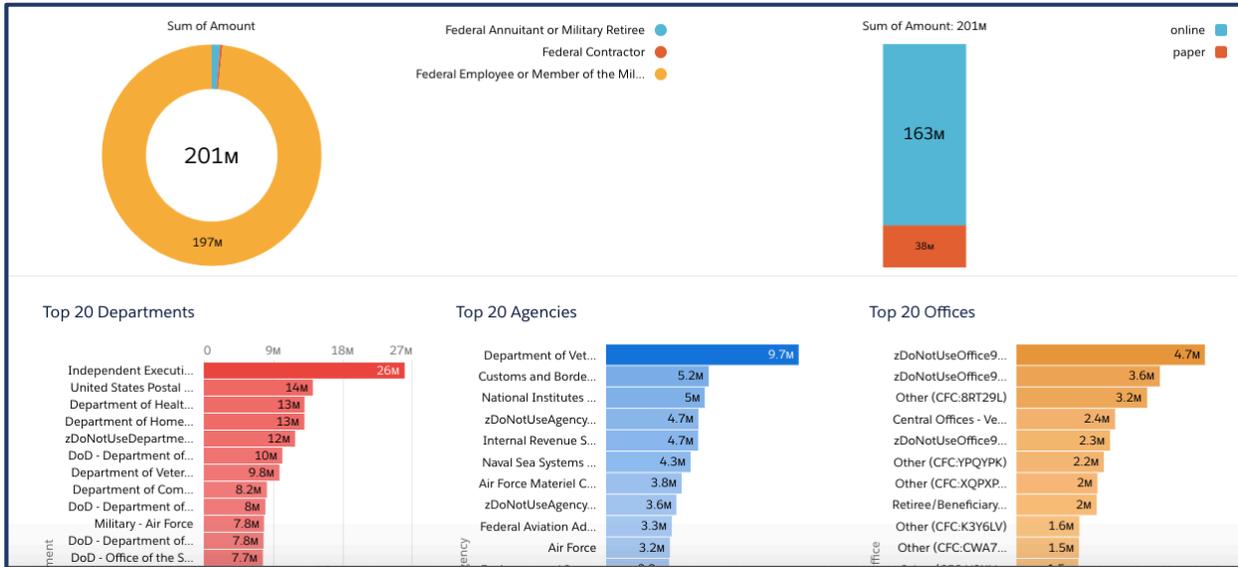
In many ways, the new CFC is shorthand for a digital transformation. This transformation began in 2017 with the introduction of an online, donor pledge platform (aka online pledge system for recording transactions). This consolidation effort was foundational but just the start of the journey. If the Office of Personnel Management (OPM), the campaign's sponsor, wanted to rekindle brand relevance, the CFC also needed to become more stakeholder-centric. Fortunately, the new pledge platform delivered on data. And data enables change.

Enter Kaptivate. In 2017, OPM selected Kaptivate as a campaign Outreach Coordinator. The role entrusted Kaptivate to manage the CFC's marketing and outreach effort in 13 geographic zones covering 30 states and over 3 million federal/military workforce members and retirees. The challenges facing the program were existential but recoverable. Although CFC stakeholders believed change was needed, few stakeholders could define what that change should be. We knew the answers to a more relevant and efficient program lay in the data. In the fall of 2018 we partnered with Quantica Technologies™ and Salesforce® to configure an analytics solution that could deliver the needed insight. Within eight weeks, using *Salesforce® Service Cloud* and *Einstein Analytics*, we designed multiple dashboards to provide program stakeholders with the first comprehensive and real-time analytics on campaign performance. These dashboards weren't decorative data visualizations; they were designed for actionable insight and program impact. We delivered power to purpose.

The initial pilot program gave zone boards—comprised of volunteer government managers—and OPM's CFC Office access to an array of information including performance overview, transaction data, benchmarking, and geolocating federal populations and the associated data and demographics. The response to this new insight: shock and awe. For the first time, CFC-veterans were able to see actionable intelligence from top performing accounts and zip codes. Moreover, the new ability to conduct white space analysis through our *CFC Maps* dashboard enabled campaign senior leadership to identify the areas and entities their marketing efforts

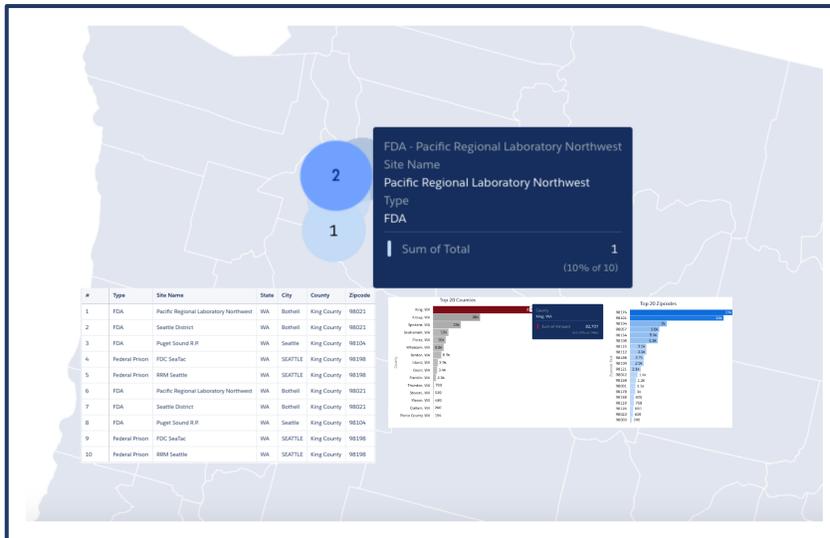
failed to reach. It also allowed them to sift quickly through vast amounts of data, enabling them to make smarter decisions with KPI visualizations and vertical and horizontal agency cross-section benchmarking.

Figure 1 Data visualizations delivering decision support



The very brief pilot ran from November 2018 to January 2019; however, it was long enough to

Figure 2 White space analysis through geolocation capabilities



serve as an epiphany for OPM. Soon after the pilot, OPM encouraged Kaptive to explore how analytics could be a significant part of the CFC’s transformation. For the CFC 2019 cycle, this nod served as our creative license to expand analytics beyond CFC’s senior leadership and place analytics in the hands of every key stakeholder. By empowering every stakeholder with actionable insight, we believe CFC can create the stakeholder-centric system necessary for renewed relevance.

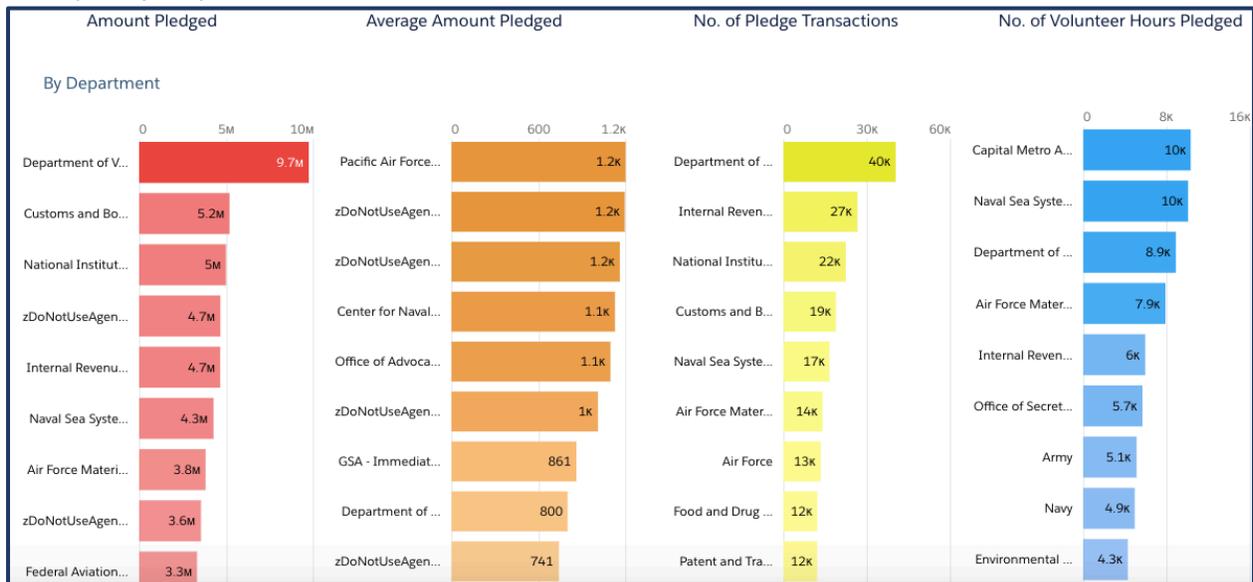
**Moving Towards Impact**

Analytics can be enthralling for data scientists and data wonks. But for the average lay person, analytics is largely academic. Our challenge was to take the license provided by OPM and find a way to get each stakeholder segment to embrace the insight we could place in their hands. To achieve this outcome, we engaged every key stakeholder segment in a feedback and evaluation process involving 14,000 government volunteers that serve as our agency campaign managers;

2,500 participating charities and 75 charitable federations; and, 13 governing boards in our zones.

Armed with this insight into the discrete challenges associated with each role, we designed an analytics solution tailored for adoption and impact. For our campaign volunteer army, we combined a third-party Learning Management System (LMS), *Salesforce Government Cloud*, a *Customer Community Plus* platform with a *Community Analytics* plugin to create a gamified version of analytics. This competition-oriented dashboard allows the community user to configure a leaderboard based on an array of variables. At a time when their office peers have many ways to express themselves philanthropically, the *CFC Leaderboard* allows these volunteer Campaign Managers to position CFC participation as a global, national, or local competition... with positive community impact. It can also drive engagement at the highest levels of government by targeting Agency Heads throughout the country as recipients of these leaderboard results.

Figure 3 Our Volunteer Communities can configure any number of leaderboards to introduce competition and gamify the consumption of analytics.



For local charities and national federations, we designed a dashboard providing them with cause-specific market share analysis. In this version of analytics (*CFC Analytics Community for Charities*), powered by a third party LMS, *Salesforce Government Cloud*, a *Customer Community Plus* platform with a *Community Analytics* plugin, the user not only gets insight into their own fan base but also how they're performing relative to their specific cause group. This actionable insight allows them to make outreach and investment decisions throughout the global campaign. For federations, this insight provides a powerful value they can pass on to their membership under their brands and benefits structure.

Finally, adding *Salesforce CRM* to the mix, we have given our zone boards, OPM, and our own staff the ability to access all of the aforementioned dashboards as a means of nudging behavior through competition, recommendations, and white space analysis. The latter element allows us to assess the reach of our national marketing and communications effort by identifying our market touchpoints (and opportunity costs) against the context of over 60,000 federal and military installations mapped to the county and zip code level.

Our activity as Outreach Coordinator translates into thousands of touchpoints with every federal civilian agency, every military component, the federal legislative and judicial branches, and, in the charitable sector, many members of the *Philanthropy 400* who participate in the program. In short, the program's comprehensive breadth of coverage is without peer and our role provides a unique perch. As CFC 2019's unfolds, we're excited about the experiment we've begun. We believe configuring analytics for the stakeholder role will drive engagement and inspire new efficiencies in the program's marketing spend. We also believe users will also use these tools to spark new ideas and activities as well as launch unanticipated initiatives. It is this spontaneous use of campaign intelligence that may hold the greatest promise for the continued transformation of this extraordinary federal program.

### **Salesforce and Kaptive Collaboration**

Because the CFC touches every nook and cranny of the federal government and military, and now extends to the entire retiree and contractor population, we believe there is no better showcase for our work and the Salesforce suite of products. Rapidly shaping analytics to address this unique challenge also demonstrates the power of the Salesforce suite and *Einstein Analytics*. And we're just getting started. In time, and as the transaction volume grows, we expect to use the platform's AI capabilities to evolve from descriptive analytics to predictive and prescriptive insights. As the program evolves and begins to impact outcomes, the case study for our collaboration in this vital program will open new doors and present new challenges.

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### **The Partners**



[Kaptive](#) is a marketing and management consulting firm, helping clients plan for—and navigate—change. We give voice to vision.

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[Quantica](#) provides innovative enterprise-level software solutions and consulting services to government organizations, multilateral agencies and foundations.

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[Salesforce](#) is a customer relationship management solution that brings companies and customers together.

For more information on how we can design and deliver a solution to realize your change vision, contact us at **888.527.8488** or [analytics@kaptivegroup.com](mailto:analytics@kaptivegroup.com).